



HePS

Department Implementation Guidelines

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This guide outlines a 5-step process for the implementation of HePS in a department. It is not intended to be all-inclusive. The actual implementation process will vary with the size and complexity of the department

Although HePS training and implementation is currently for the small purchase request for quotes (RFQ) process, planning for departmental setup should be conducted keeping in mind the eventual inclusion of solicitation of IFBs and RFPs on HePS. Additional training will be provided.

1. Business Process Review & Organizational Meeting

The purpose of this meeting is to help the department understand HePS, how to utilize it, and how it will impact their operation. Roles and responsibilities will be discussed and the department will make decisions regarding implementation.

Who should attend?

Key personnel from department management, information technology, and the purchasing section(s). They will meet with the SicommNet project team to review how HePS works and discuss how it impacts departmental purchasing. The department key personnel must be able to make decisions regarding business processes before implementation can take place.

What will SicommNet Do?

SicommNet will provide an overview of the system, demonstrate it and assist the department key personnel in determining how best to implement the system.

How can the department prepare?

The department should appoint a system administrator, department purchasing contact and, depending upon the size of the department, a project team to work with SicommNet.

What happens at the Business Process review and Organizational Meeting?

- General discussion of HePS and e-procurement
- HePS demo and description of it's features
- Discussion of rules for use as defined by SPO policies and procedures
- Discussion of department purchasing practices and how they can be accomplished in HePS
- Identification of the impact on the department
- Discussion of an implementation plan and change management
- Identification of the roles & responsibilities of both parties
- Discussion of the impact on the department's vendor community
- Confirmation of the System Administrator and (as needed) Project Implementation Team
- Establishment of General timelines

How long will the process take and when are the users trained?

The length of the process will vary depending on the complexity of the department. Generally, the business process review and the actual department setup process take place 30 days prior to user training.

2. Developing an Implementation Plan

In Step 2 the department key purchasing contact/system administrator or implementation team develops the specifics of the implementation plan. SicommNet will offer guidance and suggestions for the plan. A plan is necessary as limited resources must be allocated to accomplish the implementation successfully. The size and complexity of the department will determine the level of complexity of the implementation plan. The typical implementation plan will consist of:

- Assignment of key personnel to oversee/assist in implementation
- Identification of unique business requirements and communicate issues to SicommNet
- Identification of timelines for implementation, set goals for implementation
- Identification of users and their roles (requisitioners, approvers, buyers, managers, etc.)
- Schedule training – requires a computer lab
- Plan for follow up with trained users

3. Department Setup

Prior to training, a department must “load” the system with necessary information. The system administrator or system administration staff does this, with assistance from SicommNet, by selecting various options, pasting text, and uploading documents or graphics. System administrators do not need an IT background.

The assigned department purchasing contact/system administrator meets with the SicommNet project team to identify the information to be uploaded (see page 5.). It usually takes several days to a week to review the information/processes and to determine how it is to be defined for the system. Identification of the information generally takes one day. Actual data entry of information usually takes one day.

Note: There are two levels of system administration; 1) a “system level administration” (SPO) and 2) a “department level administration”

The system level administrator (SPO) is responsible for creating the overriding rules of the system that affect all departments and has the privilege to create departments and to authorize department level system administrators. Departments have their own processing rules, buyers, requisitioners, approvers, billing point and delivery point libraries.

The department level system administrator can view and collect information on the activity of their department by running standard system reports or by logging in as a department user to view their activity.

Topics for Department System Administrators Training

- Creating and maintaining department information
- Creating and maintaining department accounting structures
- Pre-building department default and optional delivery points and billing addresses
- Creating new department buyers, approvers, and other staff
- Assigning department buyers to a buyer manager
- Creating department approval routing sequences
- Pre-Building department solicitation and award instructions
 - Mandatory and optional instructions by document type
- Uploading department graphics (logos, seals, etc.)
- Accessing department standard reports
- Learning to log in as a department user

4. Training Users

Buyer Training

Prior to buyer training, the buyers should be aware of HePS and the departments general plans for implementation. If possible, buyers should bring with them actual RFQa that can be created and issued in HePS.

Topics for Basic Training Small Purchase RFQs (Duration: 5 hours)

- Basics of the requisitioner process
 - Create a header
 - Create a line item
 - Using Quick Solicitation
- How to create and release a solicitation
 - Enter ,review/edit requisition information
 - create RFQ
 - Release RFQ
- How to amend a solicitation
 - Change reason
 - Edit solicitation information
 - Edit line items, attachments
 - Amend release date
- How to create an award
 - Lump sum awards
 - Abstract, choose vendor, award
 - Review/edit purchase order
 - Complete award
 - Line item awards
 - Abstract, choose vendor, award
 - Awards manager,
 - Create line item award
 - Review/edit purchase order
 - Repeat steps for next line item
- Manage awards
- How to find historical information
 - Search window
 - Fast purchase order lookup
- Understanding the help system
- Questions and answers

Topics for Advanced Training

Duration: 3 hrs

- More options for creating and editing awards
- Multiple awards
- Change orders
- Questions and answers

Approver Training

Approvers are encouraged to attend the buyer training to be fully knowledgeable about how the system works and how their approval impacts purchasing in the HePS environment.

Topics for Approver Training (Duration: 1 hour)

- Review/approve documents awaiting action
- Rejections
- Understanding the help system
- Questions and answers
- Practice session

5. User Groups

As a final step in this process, it is strongly suggested that the department create User Groups within the department to discuss and provide feedback to the department, SPO and SicommNet to improve HePS. SPO and SicommNet are committed to the constant improvement of the system. The User Groups should meet regularly to discuss issues and provide input to the department system administrator and/or project team. SPO will also request departments participate in statewide user groups to provide feedback and improve the system

Required Information

General

- Department, Primary (HQ) Address, Phone, Fax
- Director (or Purchasing Head), Phone, Fax, Email
- System Administrator, Phone, Fax, Email Address

Users. Name, Title, Phone, Fax, Email, and role (buyer, approver, manager)

Delivery and Billing Information. It is helpful to pre-load multiple billing and delivery in the system for use by users to select on a drop-down list. Users may also enter billing and delivery addresses at the time of solicitation creation

- Billing or Delivery Point Code (Abbreviation to appear on drop-down menu, for example: DAGS, Central Services Division would be DAGSCSD)
- Name, Address Phone, Fax
- Billing or Delivery Contact Person, Phone, Fax, Email

Map Workflow/Approval System. Department system administrators create, assign and revise approval routing for individual users. In order to properly map work flows in the system, the system administrators must understand the department's approval processes. The system is designed to support complex approval routes. SicommNet project staff will meet with the department to fully explain approval routing.

Optional Information. This information may be entered in the system prior to use, at a later time, or, in some cases, by users at time of requisition/solicitation creation.

Department Accounting Structures. Standard department specific accounting structures may be entered and saved for use by requisitioners and buyers. These appear on drop-down lists during requisition creation. The system also has the ability to use p-card information.

Commodities. The Department level administrator can create commodity groups using the National Institute of Governmental Purchasing, Inc. (NIGP) commodity code for each individual or team that is authorized to receive requisitions and use them to create solicitations.

Staff Assignments. Groups of users can be assigned to other users such as buyer managers who can view and assign workload within their group.

Certifications/Licenses. The Department level administrator can create department specific professional certification/license lists such as certified general contractor or general service contractor. Buyers may attach these when creating solicitations.

Solicitation/Award Instructions. Standard solicitation and award instructions, including links to state general conditions and tax information are pre-loaded and automatically appear on every solicitation or award. Additional optional instructions to vendors specific to the department can be pre-loaded into the system that can optionally appear on every document or be chosen as options by buyers during the solicitation creation process. Instructions may be created by solicitation (e.g. RFQ, RFB, RFP, RFI) and award type (e.g. Purchase Order, Contract). Buyers may also create solicitation instructions for the specific solicitation at the time of document creation.

Upload Files. Department logos, seals, or other graphics to be uploaded to the system that will show on every document, giving the documents a customized look for the department.